Compliance Model Updates and Corrections – Release Notes

April 2023 version 3.0

- **Critical Correction –** April 2023.
    - **Issue:** A formula error was discovered in the Excel-based Compliance Model. This error was located on the "District 1" tab of the workbook in column AF. This formula is supposed to include a reference to column AE of the same workbook.
    - **Impact:** Without this reference, the formula fails to account for potential limitations to unit capacity where zoning includes a minimum lot size requirement and additional lot area per dwelling unit above the minimum lot size requirement (input in cells E24:E25 of the 'Checklist Parameters' tab). When this requirement is the limiting factor (i.e. is more restrictive for unit capacity than other zoning elements), the model will overstate the unit capacity for those parcels.
    - **Remedy:** The formula was corrected to incorporate the missing column reference. The other "District" tabs in the workbook did not have the same error, so only column AF of the "District 1" tab needed to be remedied.
    - **Recommendation:** Compliance Model users should immediately replace older versions of the Excel-based model with this updated version, even if the district(s) being tested in the model do not have a minimum lot size that increases with unit count. This will ensure any future changes to the district, or any copy and pasting from one model to another, does not result in an erroneous unit capacity estimate.

- **Critical Correction –** April 2023
    - **Issue:** A formula error was discovered in the Excel-based Compliance Model. This error is located on the 'Summary' tab in cells C13:G13. This formula is supposed to reference cells C8:G8 of the 'Summary' tab to check for any district unit cap limits that may be in place, but that reference was not incorporated in the formula.
    - **Impact:** If the district has a unit cap that falls below the modeled unit capacity, the model Summary tab will overstate the unit capacity for the district.
    - **Remedy:** The formula in cells C13:G13 of the 'Summary' tab have been updated to properly check for district unit caps and choose the lower of that value and the modeled unit capacity.
    - **Recommendation:** Compliance Model users should immediately replace older versions of the Excel-based model with this updated version, even if the district(s) being tested in the model do not include a district unit cap limit. This will ensure any future changes to the district, or any copy and pasting from one model to another, does not result in an erroneous unit capacity estimate.

February 2023 version 2.0

- **Minor Correction –** February 2023
    - **Issue:** Checklist Parameters' Tab: Rows 38:43. Stories and FAR input formatting issue; when users input a fraction instead of a decimal, Excel automatically formatted the input as a date. Users were not able to reformat the cell.

- o **Impact:** Impacted clarity and interpretability of those cells, visually. There is no impact on model performance or calculations.
  - o **Remedy:** Used data validation to coerce a fraction into a decimal. Users should now be able to enter a fraction and have it automatically converted to a decimal, as required.
  - o **Recommendation:** Although this change is not particularly substantive, users are advised to download and work with the updated model.

- **Minor Correction –** February 2023
  - o **Issue:** 'Summary' Tab cells C19:G19 - District Acreage (district gross acreage). These cells were erroneously pulling in the district density denominator instead of the total district acreage.
  - o **Impact:** No impact on model calculations or results. This simply displays a different value on the summary tab relative to the district size. This change will provide the expected value in the cell, which will be helpful in reviewing model results.
  - o **Remedy:** Formulas have been repointed to pick up the appropriate total district area from the 'Checklist District ID' tab (C54:C58).
  - o **Recommendation:** Although this change is not particularly substantive, users are advised to download and work with the updated model.

- **Improved Performance –** February 2023
  - o **Issue:** Limit of 1,000 rows per district was too small for larger districts.
  - o **Impact:** Communities with more than 1,000 parcels in their district needed to use multiple tabs to analyze and interpret results.
  - o **Remedy:** Increased the number of allowable parcel records from 1,000 to 2,000, accommodating more expansive districts.
  - o **Recommendation:** Although this change is not particularly substantive, users are advised to download and work with the updated model, particularly if they are modeling districts with more than 1,000 parcel records.

November 2022 – Model Release version 1.0